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Winchester resident Katie Soule elected to Mass Society of CPAs board of directors

May 31, 2024 . 12:56 PM — 2 min read

The following was submitted by the Massachusetts Society of Certified Public Accountants:

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The Massachusetts Society of Certified Public Accountants (MassCPAs) recently announced that Winchester resident Katie Soule, CPA, CFP, CIMA, was elected to serve a second year on its 2024-2025 fiscal year, which began May 1.

Soule is vice president and wealth management advisor at Merrill Lynch. With her extensive experience in both accounting and finance, she is uniquely positioned to serve as a trusted advisor, skillfully navigating the complexities of her clients' financial lives.

Merrill Lynch is one of the largest wealth management businesses in the world with financial advisors that combine knowledge and experience with a deep understanding of helping their clients pursue the lives they want.

MassCPAs Board of Directors is a group of 19 elected members that sets policies, manages programs and oversees activities that benefit the 11,500-member organization and accounting profession in Massachusetts.

"MassCPAs Board of Directors are an exceptional and diverse group of leaders," said Zach Donah, CAE, MassCPAs president and CEO. "Their unique backgrounds and perspectives will be instrumental in shaping the Society's priorities and propelling the accounting industry in Massachusetts forward. I have no doubt that Katie's contributions will benefit not just the Society and our community, but the entire profession for years to come."

Soule is a seasoned expert in crafting personalized financial plans, adeptly managing investments and strategically minimizing taxes to safeguard and enhance her clients' wealth. She brings invaluable insights into pivotal financial decision-making moments. Her deep understanding enables her to deftly navigate through tax law changes and evolving personal and family dynamics, ensuring her clients' financial stability and gro

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With a collaborative approach at the core of her practice, Soule works closely with her clients' accountants, attorneys and other advisors to tailor strategies that precisely align with their unique personal, philanthropic and tax planning objectives.

Beyond professional excellence, Soule is deeply committed to the well-being of her clients, valuing her role in improving their quality of life through the dedicated efforts of her team. Her exceptional achievements have garnered her widespread recognition, including the 2020 Experienced Leader award from MassCPAs' Woman to Watch program and her team's distinction as one of the best in the state for Wealth Management by Forbes in 2024.

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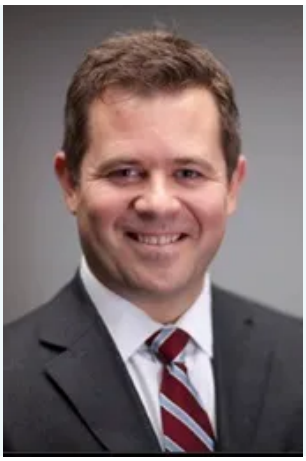

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Friday, March 13, beginning at 7:30 p.m., live in-person and live streamed from the stunning Ripley Chapel at First Congregational Church, Winchester, 21 Church St., join in with Syldason, a duo concert featuring Sylvie Zakarian,

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